

SMART Governing Checklist for FY09 Planning

(Once you have attended the proper training session(s), this checklist should act as a guide for setting up your FY09 planning and submitting your agency's SMART Plan.)

1. ☐ Review and familiarize yourself with the SMART Planning Manual and your agency's FY08 Budget Request.
 - Familiarize yourself and other members of the planning team with the content provided within the manual (this will be used during review sessions with the agency planning team and Executive Planning Office).
2. ☐ Meet with a member of the Executive Planning Office.
 - *Planning feedback is highly recommended.*
 - This meeting will provide instructional feedback for your agency as you prepare to write the FY09 Plan.
 - A member of the Executive Planning Office will help with any of your agency's needs associated with the SMART Planning process, SMART forms, or the SMART Web Application.
4. ☐ Set an agency-wide agenda for the planning process.
 - Meet with your Commissioner / Director / Board and Agency Planning Team to review the SMART Planning process, assess your agency's current plan, and establish a planning agenda for FY09.
 - Conduct an agency-wide internal/external assessment to define priorities and identify obstacles standing in the way of progress. [Click here to access the SMART Internal/External Assessment Worksheet.](#)
5. ☐ Communicate your established planning agenda and distribute all necessary materials to the participants in your agency.
 - You can find all planning materials on the SMART Website at www.SMART.Alabama.gov. These materials include worksheets which provide a recommended template for gathering planning information within an agency. You will also find example plans, a library of planning resources, and guides for reviewing your planning documents.
 - It is important to instruct each member of your planning team to review the key goals from the FY08 Budget Request before writing the FY09 Plan. *These goals exist on a multi-level timeframe and may continue into FY09.* [Click here to access the SMART Key Goal Review Guide.](#) This guide will help you and your planning team as you transition from your FY08 planning into FY09.
 - Communicate your agency's FY08 Budget Request, FY09 Manual and SMART Planning Worksheets to divisions / planning team members.
6. ☐ Review the information gathered from all divisions within your agency planning team and provide a compiled plan to commissioner/director/board for approval.
7. ☐ Submit your FY09 SMART Plan.
 - Once your commissioner/director/board has approved your FY09 Plan, you may submit your document to the Executive Planning Office via the SMART Web Application. You may access this application at the SMART Website, by clicking on "Agency Login."